
Unit **D**

Business Procedures

Learning Plans

- Organizational/Time Management
- Employment Issues
- Labor Relations
- Training New Employees
- Business Management
- Business Plan
- Entrepreneurship
- Customer Service
- Quality
- Business Trip
- Business Luncheon

Checklists

- Organizational/Time Management
- Management Systems
- Small Business Concepts
- Business Travel Arrangements



Organizational/Time Management Learning Plan

Why This Skill Is Important

Using effective time management skills is important in saving money for a company. The objective of this unit is to learn to effectively apply organizational and time management skills in your personal life as well as in the workplace.

Related Wisconsin Model Academic Standards for Business

B.12.4, J.12.8, K.12.2, K.12.3

Competency

Apply organizational and time management skills

Linked Core Abilities

- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you set goals for organizing work and managing time
- ☐ you identify tasks to be completed
- ☐ you prioritize tasks, according to established guidelines
- ☐ scheduled tasks are completed in a logical sequence
- ☐ scheduled tasks are completed within the time limits specified
- ☐ you maintain a planning calendar
- ☐ you regularly evaluate progress/status of scheduled tasks

Conditions—How you will be evaluated:

- ☐ in the workplace and in the classroom
- ☐ as tasks are scheduled

Learning Activities

- _____ 1. Prepare and maintain a one-week log/calendar charting how time is used one week prior to time management unit. Discuss how time was spent.
- _____ 2. Create a graph using Excel to graphically show how you spent your time in a given day.
- _____ 3. Search the Internet for articles on time management.



- _____ 4. Brainstorm in groups the following topics: What is Time? Timesavers? Timewasters? Present findings to class.
- _____ 5. Watch video about time management.
- _____ 6. Listen to lecture and discuss time management.
- _____ 7. Maintain a planning calendar/computer generated for all class assignments and include a prioritized list of things to do.
- _____ 8. Maintain a planning calendar/computer generated for work prioritizing duties.
- _____ 9. Prepare and maintain a one-week log charting how time is used one week after time management unit.
- _____ 10. Create a follow-up graph using Excel to indicate changes made in your daily routine.
- _____ 11. Prepare a one- to two-page report (narrative) on the time management unit. Include all of the activities from the unit organized logically to indicate what you have learned.

Why This Skill Is Important

Job-related correspondence and employment issues such as accepting/rejecting employment offers, requesting medical/family leave, reviewing various benefits packages are very important to working people. In this unit, you will become familiar with terminology and collect information related to a variety of employment issues.

Related Wisconsin Model Academic Standards for Business

B.12.1, I.12.1, J.12.3, and J.12.8, and K.12.14

Competency

Outline the roles of support staff, supervisors, managers, and technology in achieving business goals

Linked Core Abilities

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you explain the advantages and disadvantages of centralization and decentralization of an organization
- ☐ you identify levels of management
- ☐ you identify decision-making authorities
- ☐ you describe line versus staff departments
- ☐ you describe methods used by management to communicate with employees
- ☐ you explain the importance of timely communication of information pertinent to employees
- ☐ you describe the role of technology in the overall management process

Conditions—How you will be evaluated:

- ☐ in the classroom and/or in the workplace

Learning Activities

- _____ 1. Define terminology utilized in employee benefits packages.
- _____ 2. Utilize the Internet to research the latest types of contract benefits offered to employees.
- _____ 3. Develop written communication to management to request a medical/family leave.
- _____ 4. Create written communication to accept/reject an employment offer.
- _____ 5. Critique written communication from peers.
- _____ 6. Contact local representatives from employment agencies to discuss employment trends as they pertain to benefits and salary in various industries.
- _____ 7. Compare lengths of leave (i.e., vacation, sick leave, bereavement) of local companies.
- _____ 8. Analyze health care options available to employees of local companies.
- _____ 9. Research wages of various industries in the area.
- _____ 10. Investigate union activities such as grievance procedures and arbitration.
- _____ 11. Discuss seniority policies and subcontracting and how they are related to union issues.
- _____ 12. Explore pension and retirement possibilities.

Why This Skill Is Important

An employment relationship may be formed as a result of a simple oral agreement between an employee and an employer, or it may be created by a detailed written agreement reached after lengthy negotiations. Regardless of how an employment relationship is formed, however, certain rules apply to its enforcement. In this unit, you will learn about terminology and various strategies used in labor relations.

Related Wisconsin Model Academic Standards for Business

A.12.1-2, A.12.4-5, A.12.13, A.12.20, A.BS.10, B.12.1, B.12.5, I.12.1, J.12.5, and J.12.7-8

Competency

Outline the roles of support staff, supervisors, managers, and technology in achieving business goals

Linked Core Abilities

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you explain the advantages and disadvantages of centralization and decentralization of an organization
- ☐ you identify levels of management
- ☐ you identify decision-making authorities
- ☐ you describe line versus staff departments
- ☐ you describe methods used by management to communicate with employees
- ☐ you explain the importance of timely communication of information pertinent to employees
- ☐ you describe the role of technology in the overall management process

Conditions—How you will be evaluated:

- ☐ in the classroom and/or in the workplace

Learning Activities

- _____ 1. Define terminology utilized in employee contracts.
- _____ 2. List the rights and the duties of employers and employees.
- _____ 3. Explain how the employer-employee relationship may be terminated.
- _____ 4. Debate advantages/disadvantages to employer and employee of employment-at-will and unjust dismissals.
- _____ 5. Research federal laws that affect collective bargaining agreements such as the Wagner Act or the Taft-Hartley Act.
- _____ 6. Obtain various types of employment contracts; review contents of the contracts.
- _____ 7. Discuss union vs. non-union contracts.
- _____ 8. Investigate union activities such as grievance procedures and arbitration.
- _____ 9. Discuss seniority policies and subcontracting and how they are related to union issues.
- _____ 10. Invite a local union representative and local management representative to explain major points of employment contracts.
- _____ 11. Negotiate an employment contract between two parties.

Training New Employees Learning Plan

Why This Skill Is Important

It is your first day on your new job. What should you expect? Depending upon the size of your new company, there may or may not be a formal training session for new employees. After completing this learning plan, you will have an idea of what to expect when you arrive for your first day of work.

Related Wisconsin Model Academic Standards for Business

A.12.1, A.12.5-7, A.12.11, A.12.14-16, A.12.20, B.12.1, B.12.15-16, E.BS.8, H.12.1-2, H.BS.4-6, I.12.1, I.BS.10, J.BS.1, J.BS.4-5, J.BS.7, J.BS.9, K.12.11, and H.BS.3

Competency

Outline the roles of support staff, supervisors, managers, and technology in achieving business goals

Linked Core Abilities

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you explain the advantages and disadvantages of centralization and decentralization of an organization
- ☐ you identify levels of management
- ☐ you identify decision-making authorities
- ☐ you describe line versus staff departments
- ☐ you describe methods used by management to communicate with employees
- ☐ you explain the importance of timely communication of information pertinent to employees
- ☐ you describe the role of technology in the overall management process

Conditions—How you will be evaluated:

- ☐ in the classroom and/or in the workplace

Learning Activities

- _____ 1. Interview a family member to determine how their employer handles the training of new employees.
- _____ 2. Discuss training plans the students have experienced at their past and present jobs; give an oral presentation describing the training plan used by their employer.
- _____ 3. Design an organizational chart for a company.
- _____ 4. Discuss the contents of a training manual.
- _____ 5. List examples of fringe benefits that may be available at different companies.
- _____ 6. Design a tour of the school building that might be used for a new employee.
- _____ 7. Discuss the pros and cons of public vs. private employment.
- _____ 8. List useful and important resources to have at a workstation.
- _____ 9. Define types of business ownership.
- _____ 10. Discuss evaluation tools used for employee performance rating.
- _____ 11. Design a training plan for a business of choice and prepare a multi-medium presentation for the class.
- _____ 12. Interview a human resources person about the training plan that is used and report findings to the class.
- _____ 13. Discuss responsibility of new employees to read and follow training materials.
- _____ 14. Research the absenteeism policies of various companies.
- _____ 15. List safety issues and precautions in a business office.
- _____ 16. Discuss “unwritten” rules of protocol in an office such as asking for raises, handling confidential matters, avoiding discussion of salaries, etc.

Business Management **Learning Plan**

Why This Skill Is Important

Managers are responsible for ensuring company goals are met through effective staff management and efficient procedures. In this unit you will explore management styles and practice making management decisions.

Related Wisconsin Model Academic Standards for Business

A.12.1-6, A.12.11, A.12.13-15, A.12.20, B.12.13, E.12.8, G.12.2, H.12.2-3, J.12.1-2, J.12.7, J.12.13, A.BS.6, A.BS.2, A.BS.4, A.BS.12, D.BS.2, E.BS.2, E.BS.8, H.BS.1, H.BS.4, H.BS.5, H.BS.6, J.BS.6, J.BS.11, K.BS.3

Competency

Outline the roles of support staff, supervisors, managers, and technology in achieving business goals

Linked Core Abilities

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you explain the advantages and disadvantages of centralization and decentralization of an organization
- ☐ you identify levels of management
- ☐ you identify decision-making authorities
- ☐ you describe line versus staff departments
- ☐ you describe methods used by management to communicate with employees
- ☐ you explain the importance of timely communication of information pertinent to employees
- ☐ you describe the role of technology in the overall management process

Conditions—How you will be evaluated:

- ☐ in the classroom and/or in the workplace

Learning Activities

- _____ 1. Read selected text information about business management; teach the other team members the information in the text.
- _____ 2. Create an organizational chart for a centralized business and a departmentalized business.
- _____ 3. Visit and tour a local business. Analyze the management styles of the business based on the tour.
- _____ 4. View a video on different management styles. (COKE in Japan)
- _____ 5. Discuss the management functions and the duties required to meet these functions for each management level. (Plan, Organize, Control, Direct)
- _____ 6. Dramatize different management situations, and develop various solutions to each situation.
- _____ 7. Interview a local manager and develop a job description for the manager based on the interview.
- _____ 8. Brainstorm a list of expectations and qualifications for a good manager.
- _____ 9. Listen to guest lecturers who work in Human Resources or Business Management.
- _____ 10. Participate in Mini-Business World.
- _____ 11. Analyze resumes to determine if an applicant is qualified for a job.
- _____ 12. Research a company policy and present a summary to the class.
- _____ 13. Act out human resources problems and ways to use communication to resolve the situations.
- _____ 14. Participate in a business management simulation and work with a group to solve the management dilemmas.
- _____ 15. Create a job description manual.

Why This Skill Is Important

When starting a business, the business owner will need to develop a business plan. In the unit you will design a business plan for a fictitious or real business.

Related Wisconsin Model Academic Standards for Business

A.12.3, E.12.12, F.12.6, H.12.3

Competency

Outline the concepts that guide small business operations

Linked Core Abilities

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you explain characteristics of a successful entrepreneur
- ☐ you identify costs associated with becoming an entrepreneur
- ☐ you describe advantages and disadvantages of owning a franchise
- ☐ you identify the difference between a sole proprietorship and a partnership
- ☐ you identify major components of a business plan
- ☐ you define what is needed (material, labor, etc.) to start a given business
- ☐ you identify basic records needed by a business
- ☐ you project the total cash needed to start a business (start-up, operational expenses and cash reserves)
- ☐ you examine a profit/loss statement to determine if a business is profitable
- ☐ you describe the role government plays in small business
- ☐ you give an example of a license that a small business must obtain

Conditions—How you will be evaluated:

- ☐ in the classroom

Learning Activities

- _____ 1. Brainstorm an idea for a business.
- _____ 2. View a video (WRITING AN EFFECTIVE BUSINESS PLAN by INC. Magazine) and complete related worksheets.
- _____ 3. Summarize what your business would be like (executive summary style).
- _____ 4. Conduct interviews with business owners in a related area to find out more about your business.
- _____ 5. Read about the 4 P's of Marketing.
- _____ 6. Select and describe a product or service.
- _____ 7. Create a promotion plan.
- _____ 8. Collect current articles from the Internet about businesses related to your business. Collect ideas for advertising, pricing, etc.
- _____ 9. View a video about pricing products or services.
- _____ 10. Develop a pricing strategy; complete a pricing sheet.
- _____ 11. Summarize information heard from a guest speaker from a marketing firm.
- _____ 12. Discuss your advertising ideas in a small group.
- _____ 13. Create a company slogan and logo.
- _____ 14. Make business cards and business letterhead using imported graphics.
- _____ 15. Develop two types of advertisement for your business.
- _____ 16. Predict your business expenses.
- _____ 17. Analyze your businesses financial needs using a spreadsheet.
- _____ 18. Create financial statements.
- _____ 19. Present your business plan in a multi-media presentation.

Why This Skill Is Important

Throughout this unit you will discover the importance of entrepreneurship and analyze the future prospects of entrepreneurship as a career by outlining plans for a business that you would like to own.

Related Wisconsin Model Academic Standards for Business

A.12.1, A.12.3, A.12.5-6, A.12.19-20, B.12.1, B.12.14, D.12.5-6, E.12.1, E.12.3-5, E.12.7-9, E.12.12, F.12.1, F.12.5-7, J.12.1, J.12.4, J.12.6-7, J.12.11, J.12.13-14, K.12.1

Competency

Outline the concepts that guide small business operations

Linked Core Abilities

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you explain characteristics of a successful entrepreneur
- ☐ you identify costs associated with becoming an entrepreneur
- ☐ you describe advantages and disadvantages of owning a franchise
- ☐ you identify the difference between a sole proprietorship and a partnership
- ☐ you identify major components of a business plan
- ☐ you define what is needed (material, labor, etc.) to start a given business
- ☐ you identify basic records needed by a business
- ☐ you project the total cash needed to start a business (start-up, operational expenses and cash reserves)
- ☐ you examine a profit/loss statement to determine if a business is profitable
- ☐ you describe the role government plays in small business
- ☐ you give an example of a license that a small business must obtain

Conditions—How you will be evaluated:

- ☐ in the classroom

Learning Activities

- _____ 1. Define entrepreneurship; identify characteristics by reading profile of a successful entrepreneur.
- _____ 2. Identify growth factors, areas of opportunities, and steps to take for success as an entrepreneur.
- _____ 3. Create a chart that list the five fields of businesses and identify two local businesses that are involved in these fields.
- _____ 4. Identify advantages and disadvantages of owning a business.
- _____ 5. After discussing eight types of entrepreneurs and their characteristics, determine which type of entrepreneur fits own style.
- _____ 6. List the three ways of going into business for yourself and identify advantages and disadvantages of each.
- _____ 7. Create a short list of ideas for a business by brainstorming with a team.
- _____ 8. Select a business from the list created in Activity #7.
- _____ 9. Create a business card and stationary for the fictitious business.
- _____ 10. Create a partnership agreement.
- _____ 11. Create a company organizational chart.
- _____ 12. Identify the direct competition and indirect competition.
- _____ 13. Define the target market for the business.
- _____ 14. Choose a site for the business.
- _____ 15. Identify sources of assistance for planning the enterprise; identify the role models and support systems for entrepreneurs.
- _____ 16. Define ethical behavior and identify factors that can influence this behavior.
- _____ 17. Establish the company's policy of pricing and list suppliers.
- _____ 18. Meet with the local banker or small business association employee and determine cost for start-up.
- _____ 19. Create a business plan and present it to the local banker.

Why This Skill Is Important

The purpose of this unit is to assist you in developing good customer service skills both personally and professionally.

Related Wisconsin Model Academic Standards for Business

A.12.7-13, A.12.15-17, A.12.19, F.12.7, G.12.6, I.12.5, J.12.1-3, J.12.9, J.12.11-12, and J.12.14

Competency

Outline the concepts that guide small business operations

Linked Core Abilities

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you explain characteristics of a successful entrepreneur
- ☐ you identify costs associated with becoming an entrepreneur
- ☐ you describe advantages and disadvantages of owning a franchise
- ☐ you identify the difference between a sole proprietorship and a partnership
- ☐ you identify major components of a business plan
- ☐ you define what is needed (material, labor, etc.) to start a given business
- ☐ you identify basic records needed by a business
- ☐ you project the total cash needed to start a business (start-up, operational expenses and cash reserves)
- ☐ you examine a profit/loss statement to determine if a business is profitable
- ☐ you describe the role government plays in small business
- ☐ you give an example of a license that a small business must obtain

Conditions—How you will be evaluated:

- ☐ in the classroom



Learning Activities

- _____ 1. Define AMA's definition of "marketing."
- _____ 2. Describe how you might be both a customer and a consumer.
- _____ 3. Share examples of good customer service and poor customer service.
- _____ 4. Differentiate between the different types of customer services.
- _____ 5. Demonstrate the five stages in making a buying decision as a consumer.
- _____ 6. Discuss your motives for shopping and patronizing a particular store.
- _____ 7. Complete a survey among classmates regarding customer service.
- _____ 8. Interview a manager of a fast food restaurant on customer service training.
- _____ 9. Interview a manager of a retail store on customer service training.
- _____ 10. Roleplay a situation between an employee and a customer.
- _____ 11. Complete a "positive selling attitude" survey.

Why This Skill Is Important

United States businesses aim to be successful by producing quality products. Gone are the days where everything produced is sold. Truly understanding “quality” requires a historical perspective, knowledge of quality improvement terminology used in business, and a customer focus philosophy. This unit introduces you to the Total Quality Management movement and explores how businesses are achieving quality in today’s competitive market.

Relates Wisconsin Model Academic Standards for Business

A.12.3, A.12.4, A.12.5, A.12.19, A.12.20, A.BS.2, A.BS.7, D.BS.3, E.BS.4, H.12.2, H.BS.3, H.BS.6, J.12.6, J.12.7, J.12.12, K.12.6, K.BS.2

Competency

Outline the concepts that guide small business operations

Linked Core Abilities

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you explain characteristics of a successful entrepreneur
- ☐ you identify costs associated with becoming an entrepreneur
- ☐ you describe advantages and disadvantages of owning a franchise
- ☐ you identify the difference between a sole proprietorship and a partnership
- ☐ you identify major components of a business plan
- ☐ you define what is needed (material, labor, etc.) to start a given business
- ☐ you identify basic records needed by a business
- ☐ you project the total cash needed to start a business (start-up, operational expenses and cash reserves)
- ☐ you examine a profit/loss statement to determine if a business is profitable
- ☐ you describe the role government plays in small business
- ☐ you give an example of a license that a small business must obtain

Conditions—How you will be evaluated:

- ☐ in the classroom

Learning Activities

- _____ 1. Discuss importance of quality for domestic and international competition.
- _____ 2. Discuss “changing paradigms” in the global economy. Compare yesterday’s business world with today’s business world.
- _____ 3. View video(s), which illustrate actual companies implementing quality improvement techniques.
- _____ 4. Listen to speaker(s) from local businesses on how they ensure quality in their products/services and how quality affects competition.
- _____ 5. Interview business people and parents about how they ensure quality in their organizations. Prepare a report summarizing findings and affects on you as a current and/or future worker.
- _____ 6. Define and find examples of core “quality management” principles: quality, customer focus, data driven, employee empowerment, teams, training, and leadership.
- _____ 7. Review articles pertaining to quality and customer focus.
- _____ 8. Discuss the important points of the “quality” philosophy and the major quality gurus such as Dr. W. Edwards Deming, Joseph Juran, and Phil Crosby.
- _____ 9. Discuss the “quality timeline” of how TQM evolved in the United States.
- _____ 10. Discuss the role W. Edwards Deming played in the quality movement.
- _____ 11. Review Deming’s 14 points and discuss examples in school and business.
- _____ 12. Complete a case study to analyze “quality” and “lowest possible cost.”
- _____ 13. Review mission statements from local businesses to illustrate the point of constancy of purpose and identify the total quality management components.
- _____ 14. Read articles about the changing role of employees in U.S. businesses due to competition and the quality of movement.
- _____ 15. Define and give examples of internal and external customers.

Why This Skill Is Important

Conducting business today often requires considerable travel for certain employees. In this learning plan you will make travel arrangements.

Related Wisconsin Model Academic Standards for Business

G.12.1-2, G.12.4, G.12.6-7, G.12.9

Competency

Make national and international travel and travel-related arrangements

Linked Core Abilities

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ arrangements include working with a travel agency
- ☐ you arrange for a car rental
- ☐ you arrange hotel reservations
- ☐ you prepare an itinerary
- ☐ itinerary accommodates the time necessary for travel, meetings, appointments, etc.
- ☐ itinerary contains complete information
- ☐ itinerary contains accurate information
- ☐ you arrange airline reservations
- ☐ you arrange for pickup or delivery of airline tickets
- ☐ you identify purpose of a passport
- ☐ you identify procedures and documents necessary for securing a passport
- ☐ you calculate time difference between home city and specific cities in USA
- ☐ you calculate time difference between home city and specific foreign cities
- ☐ you identify currency used in specific foreign countries
- ☐ you identify documents necessary to enter a specific country

Conditions—How you will be evaluated:

- ☐ given description of a travel situation(s) or in the workplace with an actual travel need

Learning Activities

- _____ 1. Discuss related travel terms.
- _____ 2. Interview someone who travels frequently as part of her/his job.
- _____ 3. Identify services available through travel agencies.
- _____ 4. Determine time zone differences of business trip destination.
- _____ 5. Research modes of transportation using the Internet.
- _____ 6. Decide on appropriate methods of travel.
- _____ 7. Research travel restrictions of a specific country.
- _____ 8. Research lodging choices using the Internet.
- _____ 9. Determine if passport is required, research passport procedures, and complete a passport application.
- _____ 10. Research leisure-time activities.
- _____ 11. Investigate currency exchange.
- _____ 12. Brainstorm ways to handle travel problems.
- _____ 13. Listen to speaker who explains services offered by hotel/motel.
- _____ 14. Listen to speaker who explains services within an airport.
- _____ 15. Discuss appropriate business etiquette.
- _____ 16. Discuss tipping.
- _____ 17. Determine what to pack for a business trip.
- _____ 18. Prepare an itinerary.
- _____ 19. Create a travel folder.
- _____ 20. Analyze the validity of business trip.
- _____ 21. Prepare and present a summary of the business trip.
- _____ 22. Listen to speaker who arranges business trips.
- _____ 23. Complete an expense report.

Business Luncheon Learning Plan

Why This Skill Is Important

Business luncheons are a common occurrence. The purpose for this unit is to assist you in planning a luncheon. You will need to plan the why, how, when, and where of this luncheon.

Related Wisconsin Model Academic Standards for Business

H.BS.6, J.BS.1-2, J.BS.5, J.BS.10, J.12.1, J.12.7-8, J.12.10, A.BS.3, A.BS.12, and B.BS.6

Competency

Plan a business luncheon

Linked Core Abilities

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you establish purpose for luncheon
- ☐ you set date and time for luncheon
- ☐ you plan an agenda
- ☐ you select location
- ☐ you select a menu
- ☐ you create invitations, place cards, and menu
- ☐ you greet guests as they arrive
- ☐ you MC the luncheon

Conditions—How you will be evaluated:

- ☐ in the classroom and/or in the workplace

Learning Activities

- _____ 1. Discuss components for giving a business luncheon (purpose, where, when, funding, etc.).
- _____ 2. Discuss and practice correct restaurant etiquette.
- _____ 3. Decide on purpose for luncheon (meeting, employer appreciation, etc.).
- _____ 4. Plan agenda for luncheon.
- _____ 5. Plan where the luncheon should take place (convenience, availability, and cost).
- _____ 6. Contact restaurants for menus and availability.
- _____ 7. Decide on menu.
- _____ 8. Plan the date and time of luncheon.
- _____ 9. Delegate duties to classmates (invitations, place cards, seating arrangement, menu, MC).
- _____ 10. Create invitations using desktop publishing software. (Why, where, when, RSVP).
- _____ 11. Create place cards and menus using desktop publishing software.
- _____ 12. Practice the MC's oral presentation.
- _____ 13. Arrange place cards on day of luncheon.
- _____ 14. Greet employers when they arrive to luncheon.

Organizational/Time Management Checklist

Competency

Apply organizational and time management skills

Linked Core Abilities

Use effective personal and interpersonal skills

Apply critical thinking and information processing skills

Directions

After you have learned the importance of using organizational skills and of the management of time, you will practice some specific applications of these strategies. Both in the classroom and at the workplace you will be expected to utilize skills in organizing work and in managing your time. Your supervisor and your instructor will use this checklist to determine your proficiency in this area. Carefully review the checklist as you prepare yourself for this assessment.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 you set goals for organizing work and managing time	yes no not observed	
2 you identify tasks to be completed	yes no not observed	
3 you prioritize tasks, according to established guidelines	yes no not observed	
4 scheduled tasks are completed in a logical sequence	yes no not observed	
5 scheduled tasks are completed within the time limits specified	yes no not observed	
6 you maintain a planning calendar	yes no not observed	
7 you regularly evaluate progress/status of scheduled tasks	yes no not observed	
8 you organize and maintain information (Core Ability)	yes no not observed	



Management Systems Checklist

Competency

Outline the roles of support staff, supervisors, managers, and technology in achieving business goals

Linked Core Abilities

Apply critical thinking and information processing skills
Relate to the complex interrelationships of systems

Directions

You will learn the various organizational and management plans used by businesses. Within each type you will be expected to identify levels of management, methods of communication, and supervision responsibilities. Either in the classroom or in the workplace itself, you will be asked to describe the roles and responsibilities of different staff and management personnel. Your supervisor and/or your instructor will use this checklist to determine your knowledge in this area. Carefully review the checklist as you prepare yourself for this assessment.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 you explain the advantages and disadvantages of centralization and decentralization of an organization	yes no not observed	
2 you identify levels of management	yes no not observed	
3 you identify decision-making authorities	yes no not observed	
4 you describe line versus staff departments	yes no not observed	
5 you describe methods used by management to communicate with employees	yes no not observed	
6 you explain the importance of timely communication of information pertinent to employees	yes no not observed	
7 you describe the role of technology in the overall management process	yes no not observed	
8 you recognize how organizational systems work (Core Ability)	yes no not observed	



Small Business Concepts **Checklist**

Competency

Outline the concepts that guide small business operations

Linked Core Abilities

Demonstrate basic academic skills

Use effective personal and interpersonal skills

Apply critical thinking and information processing skills

Relate to the complex interrelationships of systems

Directions

You will learn the concepts that guide the formation and operations of effective small businesses. In the classroom, you will be asked to outline the essential principles to be followed when operating a small business. Your instructor will use this checklist to determine your knowledge in this area. Carefully review the checklist as you prepare yourself for this assessment.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked “yes,” unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 you explain characteristics of a successful entrepreneur	yes no not observed	
2 you identify costs associated with becoming an entrepreneur	yes no not observed	
3 you describe advantages and disadvantages of owning a franchise	yes no not observed	
4 you identify the difference between a sole proprietorship and a partnership	yes no not observed	
5 you identify major components of a business plan	yes no not observed	
6 you define what is needed (material, labor, etc.) to start a given business	yes no not observed	
7 you identify basic records needed by a business	yes no not observed	
8 you project the total cash needed to start a business (start-up, operational expenses and cash reserves)	yes no not observed	
9 you examine a profit/loss statement to determine if a business is profitable	yes no not observed	
10 you describe the role government plays in small business	yes no not observed	
11 you give an example of a license that a small business must obtain	yes no not observed	
12 you recognize how organizational systems work (Core Ability)	yes no not observed	

Business Travel Arrangements Checklist

Competency

Make national and international travel and travel-related arrangements

Linked Core Abilities

Demonstrate basic academic skills

Use effective personal and interpersonal skills

Apply critical thinking and information processing skills

Relate to the complex interrelationships of systems

Work with a variety of technologies

Directions

Conducting business today often requires considerable national and even international travel for certain members of the staff. In the workplace and/or in a simulated situation outlined by your instructor, you will be expected to make travel arrangements. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 arrangements include working with a travel agency	yes no not observed	
2 you arrange for a car rental	yes no not observed	
3 you arrange hotel reservations	yes no not observed	
4 you prepare an itinerary	yes no not observed	
5 itinerary accommodates the time necessary for travel, meetings, appointments, etc.	yes no not observed	
6 itinerary contains complete information	yes no not observed	
7 itinerary contains accurate information	yes no not observed	
8 you arrange airline reservations	yes no not observed	
9 you arrange for pickup or delivery of airline tickets	yes no not observed	
10 you identify purpose of a passport	yes no not observed	
11 you identify procedures and documents necessary for securing a passport	yes no not observed	
12 you calculate time difference between home city and specific cities in USA	yes no not observed	
13 you calculate time difference between home city and specific foreign cities	yes no not observed	
14 you identify currency used in specific foreign countries	yes no not observed	
15 you identify documents necessary to enter a specific country	yes no not observed	
16 you propose plans of action to solve problems (Core Ability)	yes no not observed	
17 you select resources for a task that are appropriate (Core Ability)	yes no not observed	